

# Quarterly Market Indicators Report

**Q2 2024**

## Disclaimer



3

## Main Telecom Market Indicators



4-5

## Mobile services



6-9

## Fixed line telephony services



10-11

## Broadband services



12-15

## M2M subscribers & Traffic



16

## Definitions



17

















## Annex A



20-23

- The TRA has relied on information supplied to it by third parties. It has not independently verified that data and as such does not make any representations or warranties, either express or implied, that:
  - the information is free from inaccuracies, errors or omissions;
  - the information is exhaustive;
  - the information is of merchantable quality and fitness for a particular purpose.
  
- The TRA, including its officers, board members, employees, agents and contractors, is not liable for:
  - any inaccuracy, error or omission in the information contained in this document; nor
  - any loss, damage, cost or expense whether direct, indirect, consequential or special, incurred by, or arising by reason of, any person using or relying on the information and whether caused by reason of any inaccuracy, error, omission or misrepresentation in the information or otherwise.

# Main Telecom Market Indicators (Q2 2023 – Q2 2024)

	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
 Mobile subscribers	2,299,208	2,328,750	2,415,715	2,449,728	2,504,794
 Mobile penetration	146%	148%	153%	155%	159%
 Mobile prepaid subscriptions	1,506,376	1,512,500	1,561,966	1,559,011	1,598,997
 Mobile postpaid subscriptions	792,832	816,250	853,748	890,717	905,797
 Average outgoing minutes from mobile (Domestic & Inter.)	152	136	140	125	123
 Fixed telephony subscriptions	216,910	215,085	212,204	210,358	209,822
 Fixed telephony penetration (Excluding ISDN)	13.6%	13.6%	13.4%	13.3%	13.3%
 Domestic monthly average minutes per line*	56	55	56	53	52
 International outgoing minutes (Mobile)	215,140,781	191,292,046	185,562,210	173,367,504	171,564,023
 International outgoing minutes (Fixed telephony)	1,741,692	1,556,065	1,427,326	1,329,043	1,292,542
 Mobile broadband subscriptions	2,332,985	2,314,646	2,317,171	2,375,854	2,431,445
 Mobile broadband penetration rate	143%	143.2%	147%	151%	154%
 Fiber broadband subscriptions	177,369	177,935	178,862	179,111	179,690
 Fiber broadband penetration per household**	62%	62%	63%	63%	63%
 Total data usage (Petabyte)	443	474	474	475	502
 Average total data usage per month per subscription	66	63	63	62	64

\*An operator restated for the year 2022-2023.

\*\*Fiber Broadband penetration is based on the latest available number of households provided by IGA in 2024.

# Main Telecom Market Indicators for Q2 2024



Mobile subscribers: **2,504,794**

Penetration: **159%**

Average Int. & Domestic minutes per month per mobile subscription: **123**

Average data usage per mobile broadband subscription\*: **25**

Fixed telephony subscriptions (Exclud. ISDN): **209,822**

Penetration: **13.3%**

Fixed Wired Telephony subscriptions **95%**

Fixed Wireless Telephony subscriptions: **5%**

Mobile Broadband subscriptions: **2,431,445**

Mobile Broadband penetration rate: **154%**

Fiber Broadband subscriptions: **179,690**

Fiber Broadband penetration rate per household: **63%\*\***



Mobile Prepaid subscriptions: **1,598,997**

Mobile postpaid subscriptions: **905,797**

% of prepaid out of Mobile market subscriptions: **64%**

% of postpaid out of Mobile market subscriptions : **36%**

Domestic monthly average minutes per line: **52**

International Outgoing Minutes (Mobile): **171,564,023**

International Outgoing Minutes (Fixed telephony): **1,292,542**

Total Data Usage: **502 Petabyte**

Fiber Broadband Traffic: **269 Petabyte**

Avg. Traffic per broadband subscription per month: **64 GB**

Avg. Fiber Broadband Traffic per month: **509 GB**

\*Average data usage per mobile broadband subscription excludes Standalone subscribers' traffic.

\*\* Based on latest available number of households provided by IGA.

\*\*\* Includes Broadband added to voice & Standalone mobile broadband.

# Mobile services: Subscriptions\* (1/2)



Number of Mobile subscriptions (End of Q2 2024)

**2,504,794 Subscriptions**

159% Penetration rate

Q2 2023

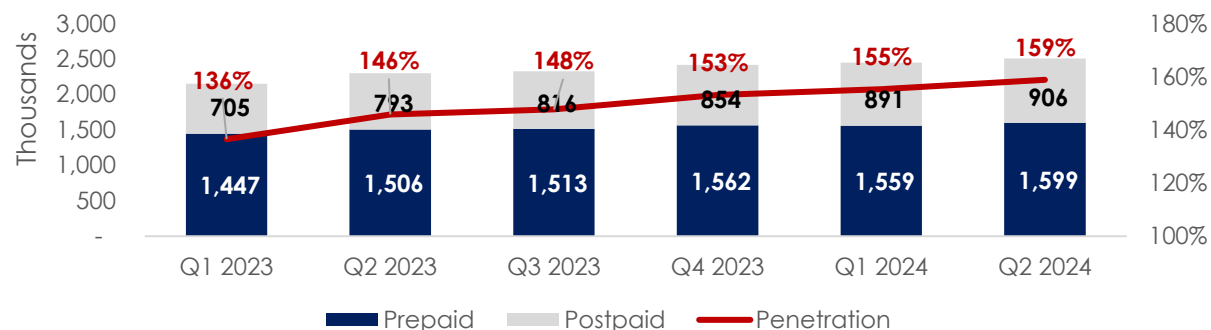
**2,299,208**

Q2 2024

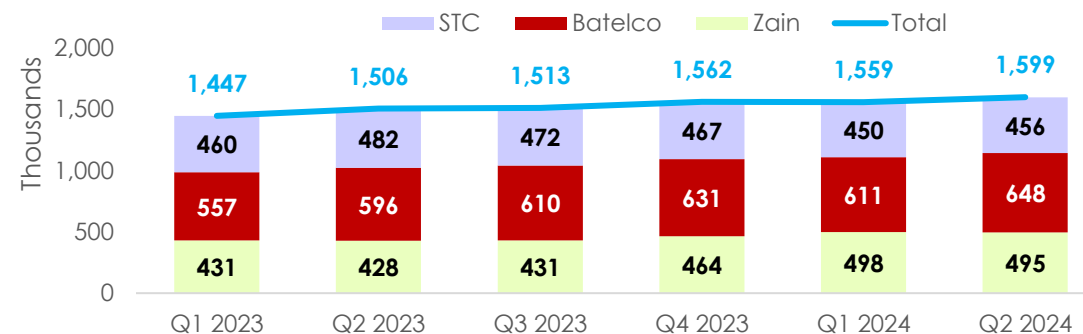
**2,504,794**

**9%**

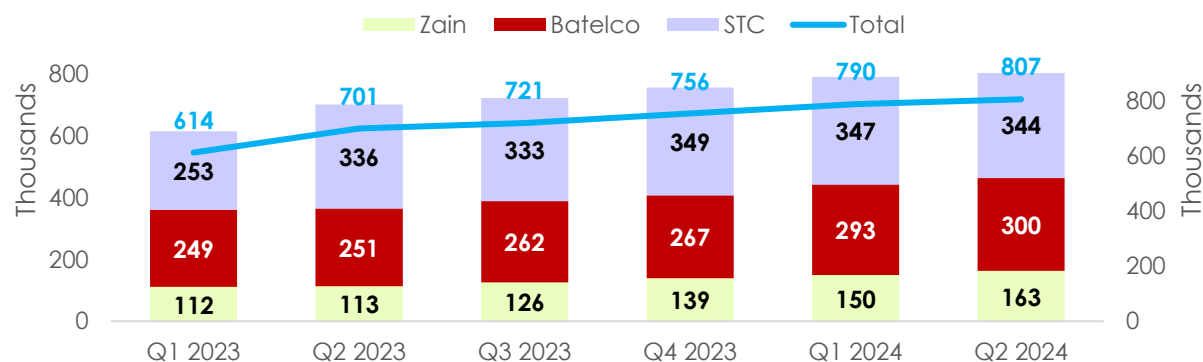
Number of Mobile Subscriptions & penetration



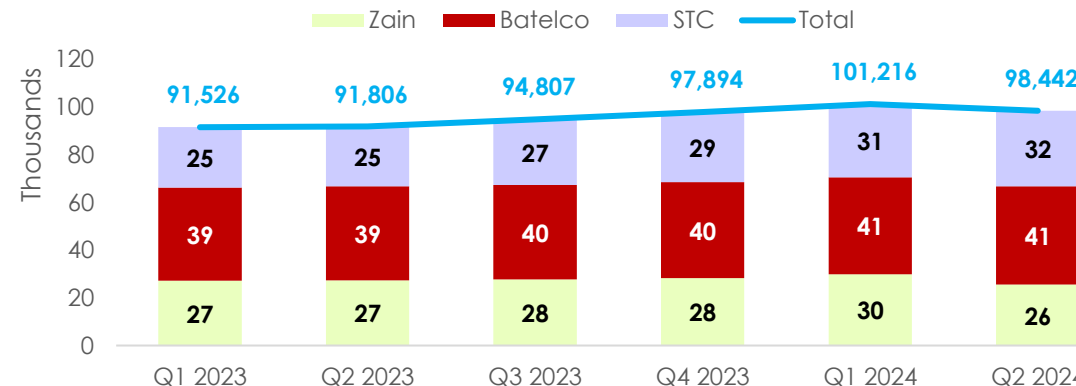
Prepaid subscribers - Residential\*\*



Postpaid subscribers - Residential



Postpaid subscribers - Non Residential



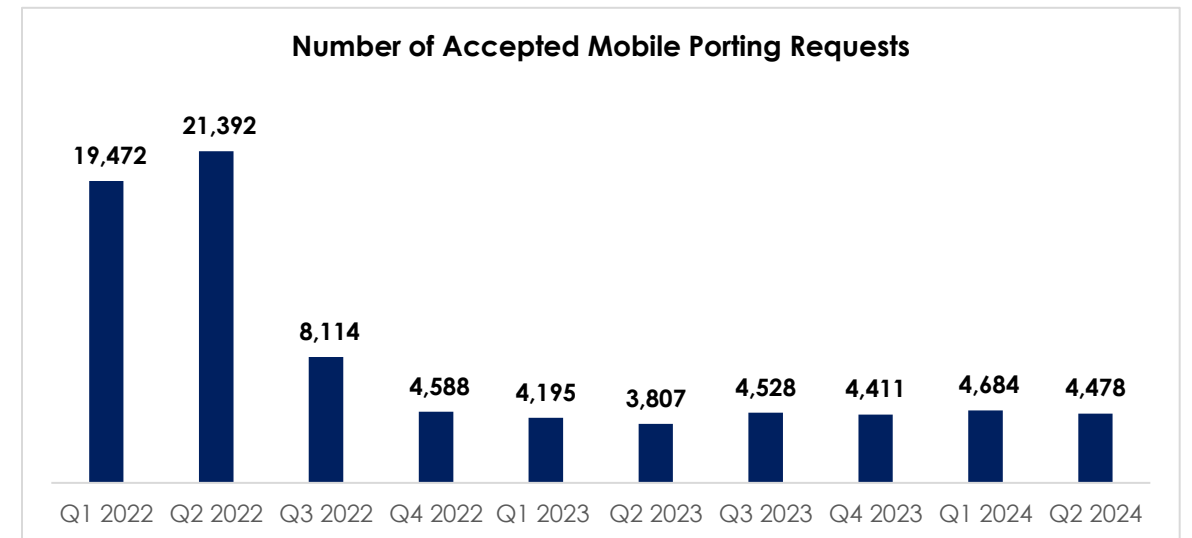
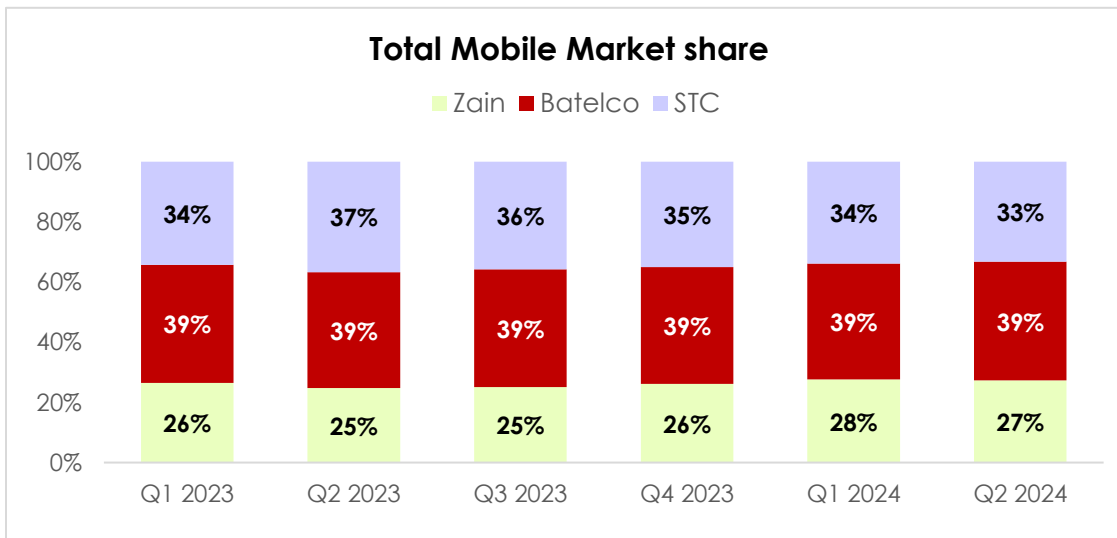
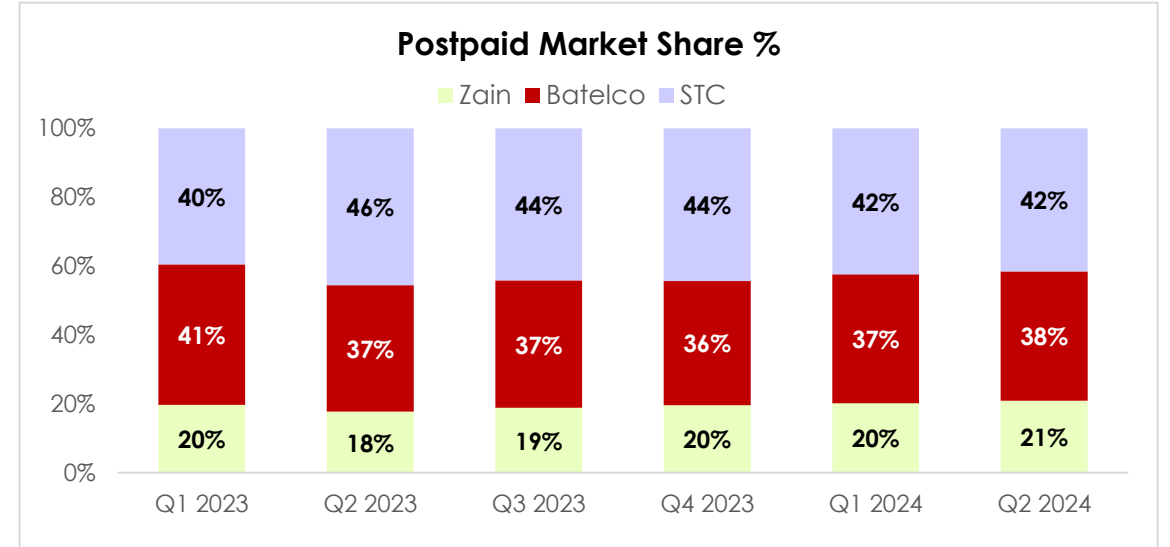
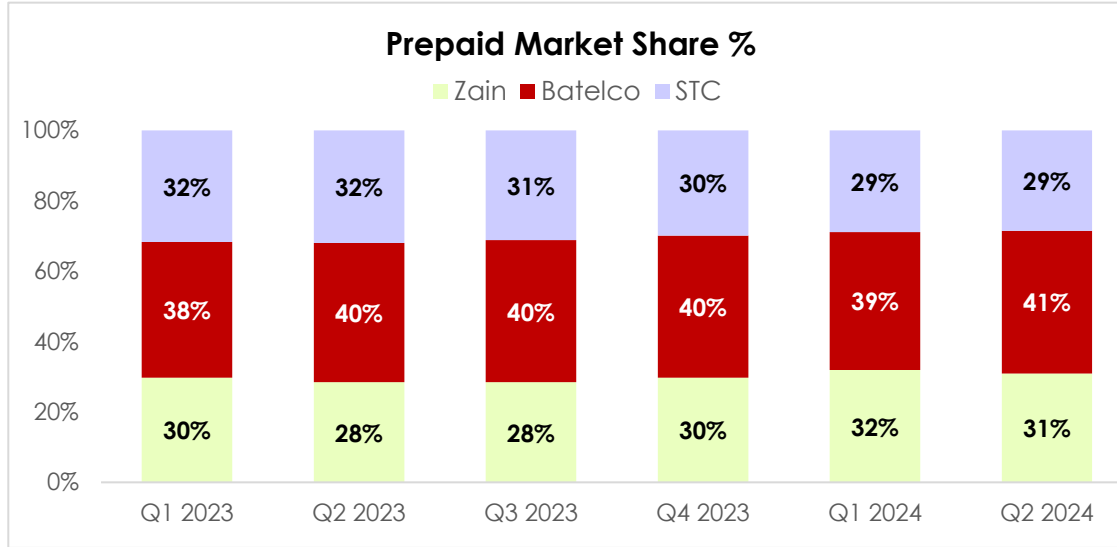
Population***	2021	2022	2023	2024
By IGA	1,504,365	1,565,000	1,577,059	1,577,059

\* Data for Prepaid Non-residential subscribers not yet available for all MNOs.

\*\* Increase in prepaid and postpaid subscribers is due to operators activating voice on their standalone mobile broadband packages.

\*\*\* Source: <https://www.bna.bh/en/HRHtheCrownPrinceandPrimeMinisterchairstheweeklyCabinetMeeting.aspx?cms=q8FmFJgiscL2fwIzON1%2BDIHlz%2BofVmjO4F61CX7bmSQ%3D>

# Mobile services: Subscriptions (2/2)

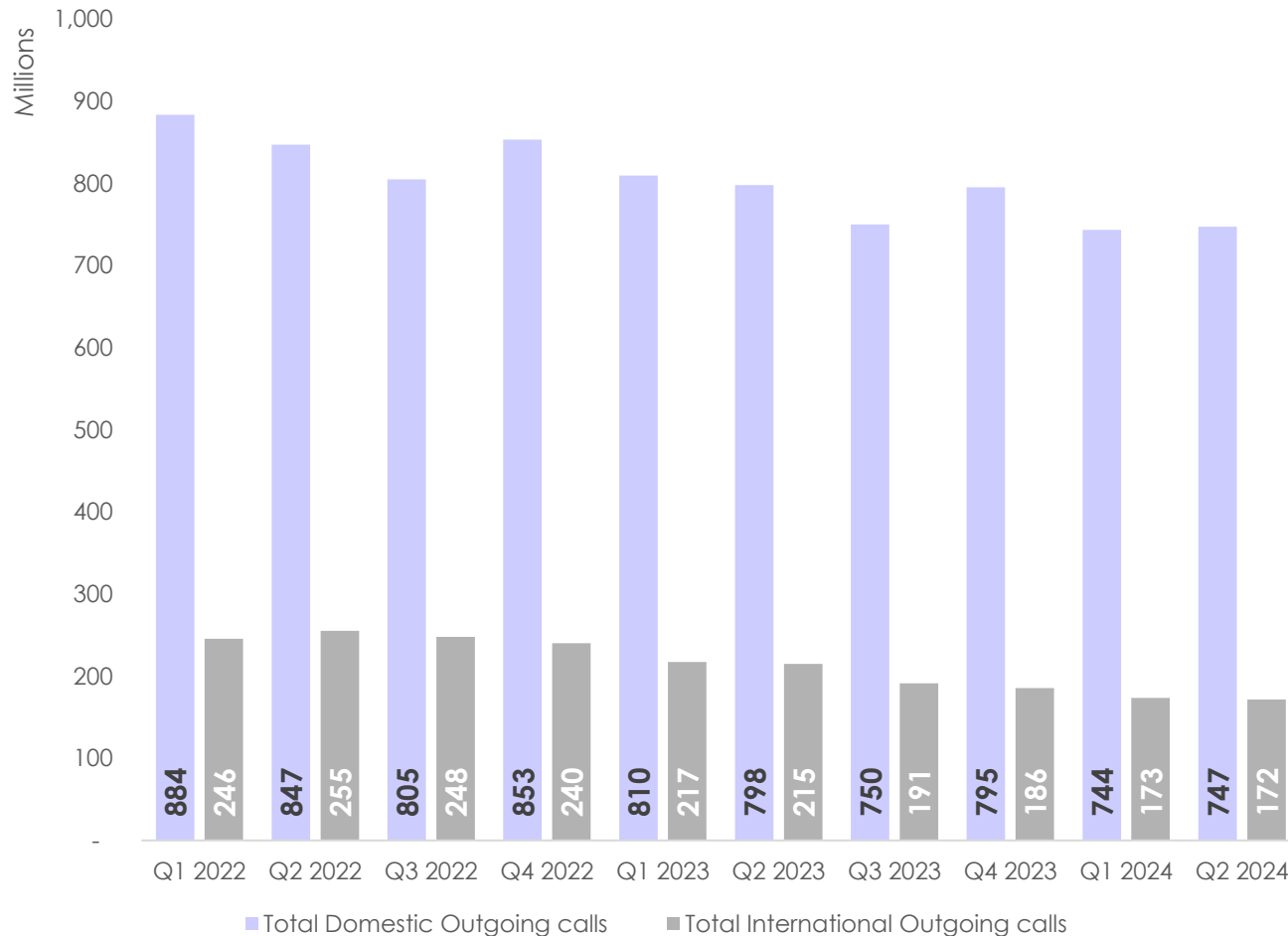


# Mobile services: Traffic\* (Minutes) (1/2)



Total Outgoing Traffic in Minutes  
(Domestic + International)

Total Outgoing Mobile Voice Traffic in Millions of Minutes  
(Domestic-International)



Q2 2023

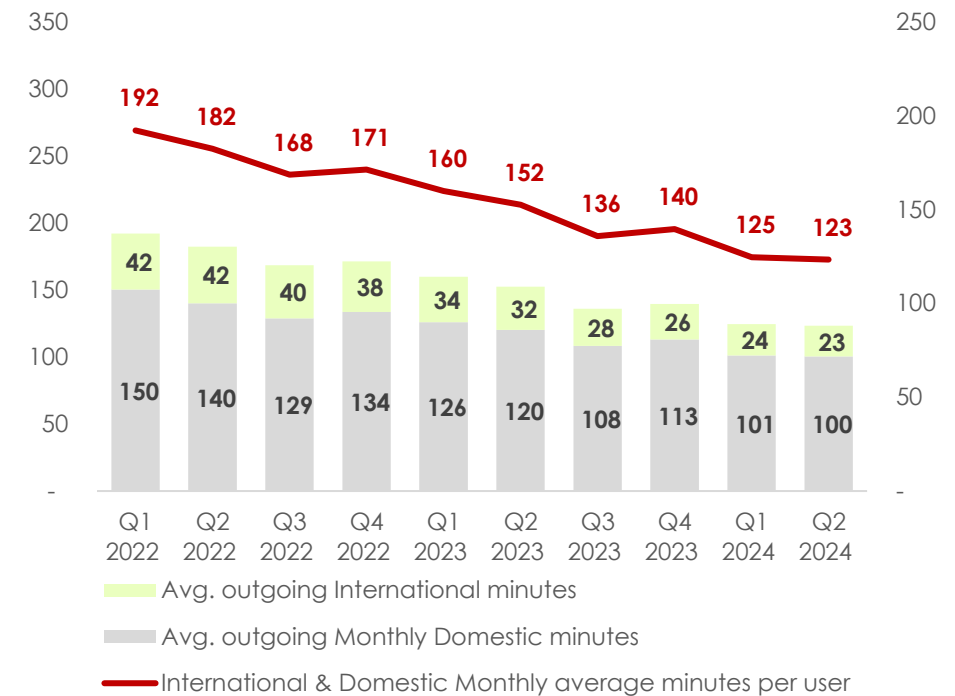
1,013,135,808

Q2 2024

918,955,567

▼9%

Average Monthly Minutes per User

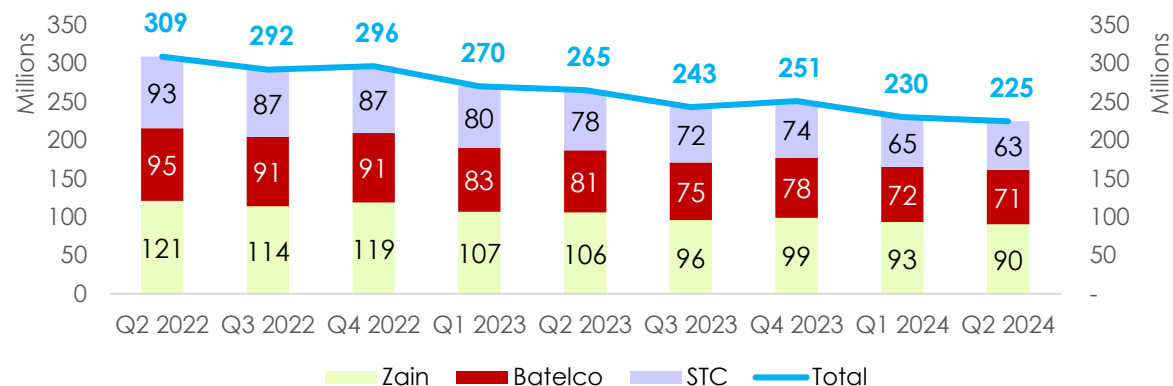


\* Historical data for Non-residential (Domestic & Intl.) Traffic is currently unavailable.

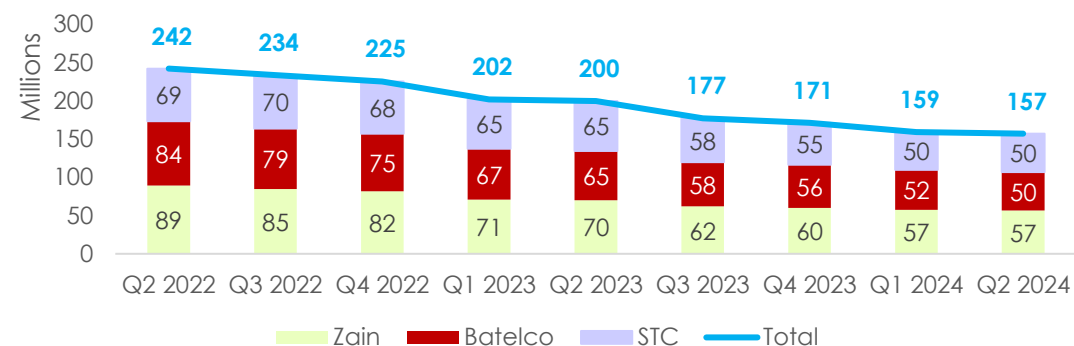


# Mobile services: Traffic\* (Minutes) (2/2)

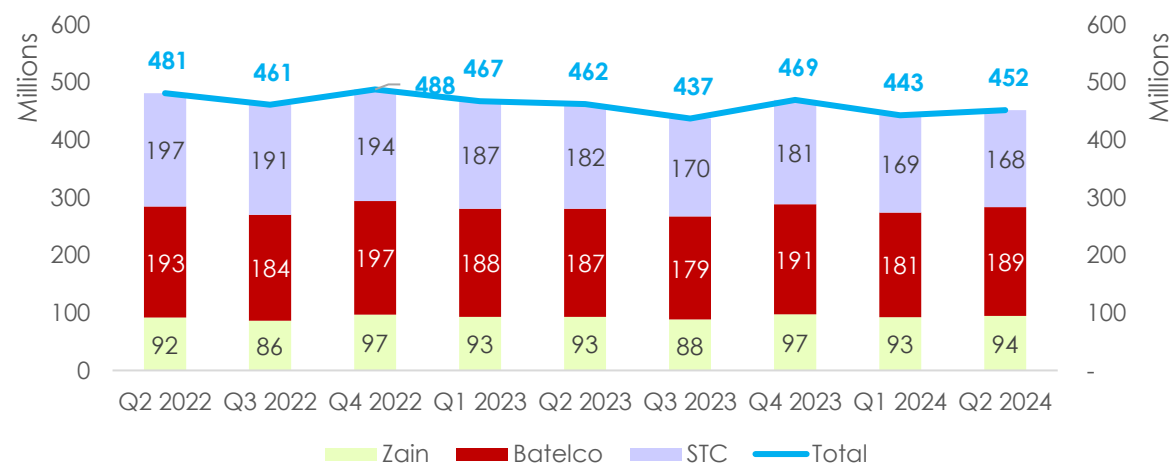
Prepaid Domestic Outgoing traffic (minutes) - residential



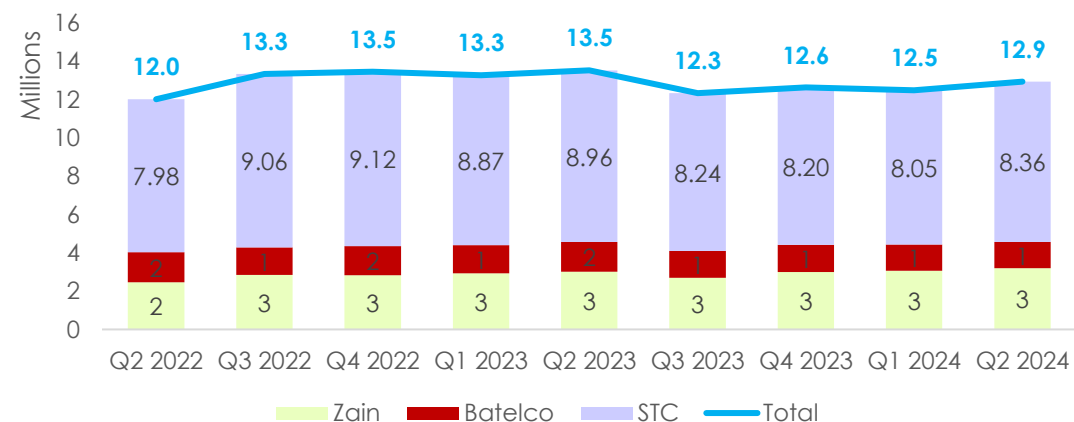
Prepaid International Outgoing traffic (minutes) - residential



Postpaid Domestic Outgoing traffic (minutes) - residential



Postpaid International Outgoing traffic (minutes) - residential

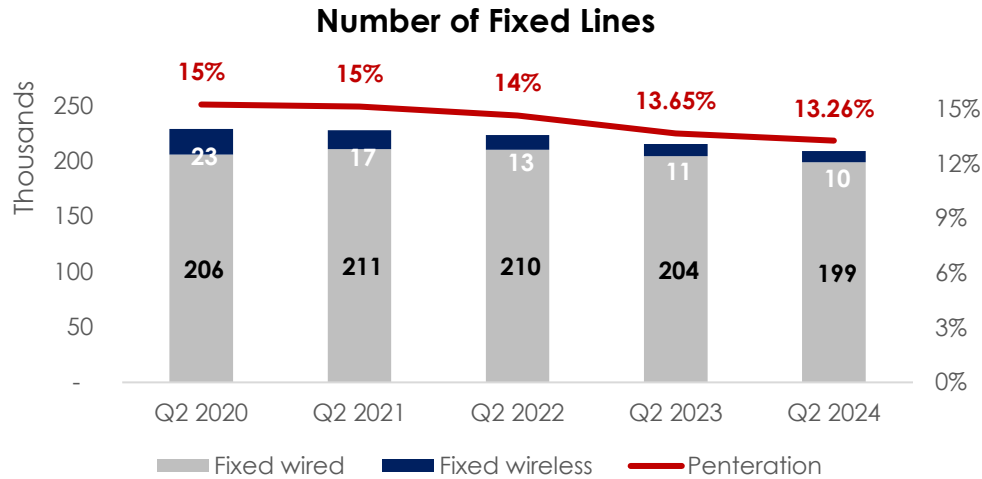


\* Historical data for Non-residential (Domestic & Intl.) Traffic is currently unavailable.

# Fixed telephony services: Subscriptions (PSTN & Fixed wireless)\*



No. of fixed telephony subscriptions  
(Excluding ISDN)



End of Q2 2023

**215,625**

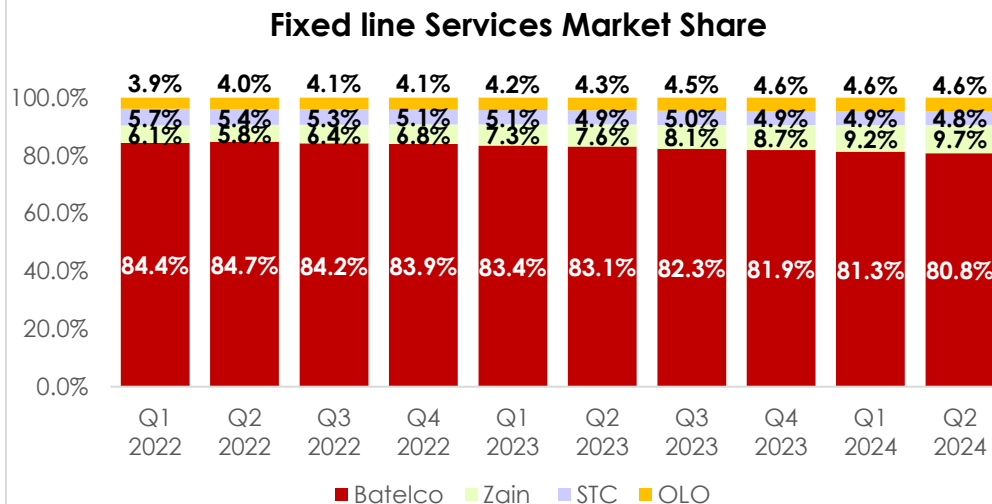
13.7% Penetration rate

End of Q2 2024

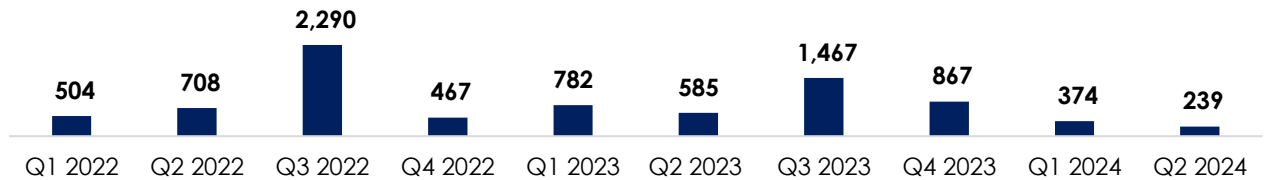
**209,822**

13.3% Penetration rate

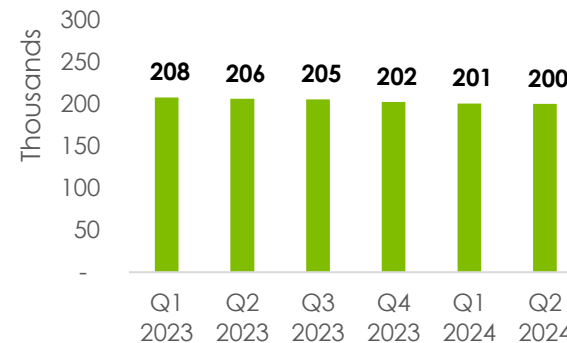
	2021	2022	2023	Q1 2024	Q2 2024
	227,133	217,077	212,204	210,358	209,822
% of Fixed Wired	93%	94%	95%	95%	95%
% of Fixed Wireless	7%	6%	5%	5%	5%



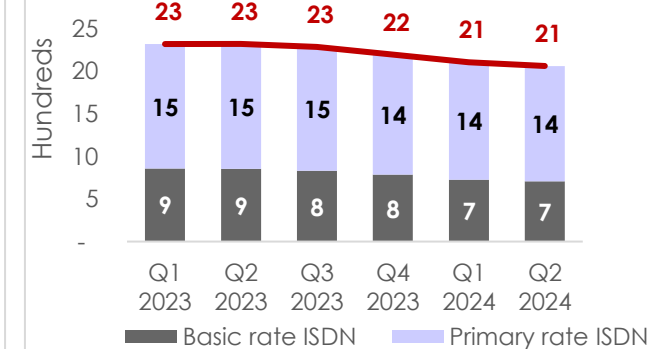
## Number of Accepted Fixed Line Porting Requests



## Total VoIP Subscriptions



## Total ISDN



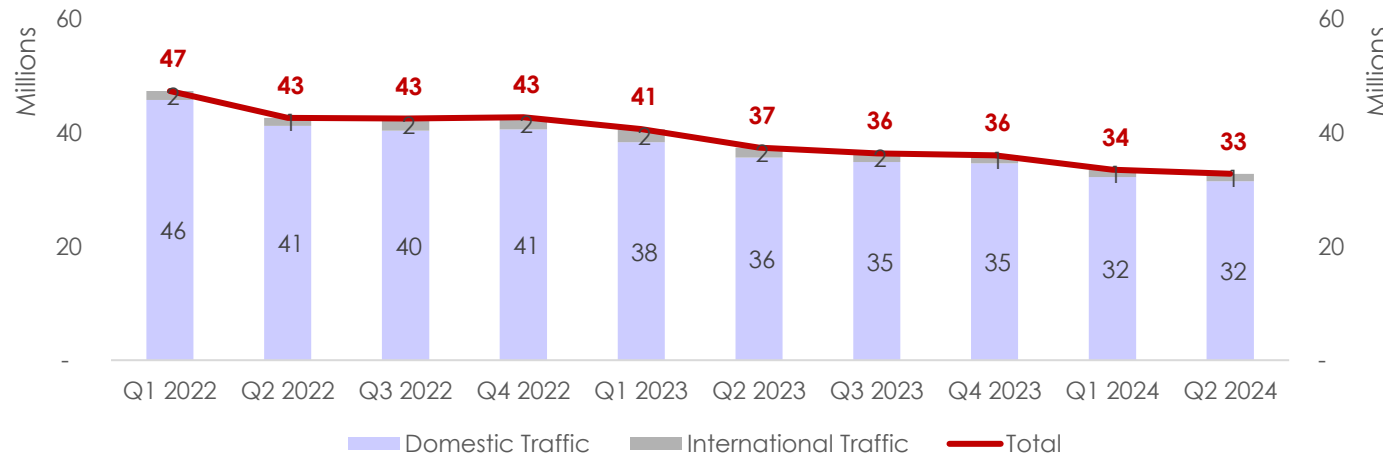
\* Includes VoIP as of 2021 but excludes ISDN.

# Fixed telephony services: Traffic (PSTN & Wireless - Minutes)\*



Total fixed domestic outgoing traffic in minutes

Fixed line Domestic & International Outgoing traffic



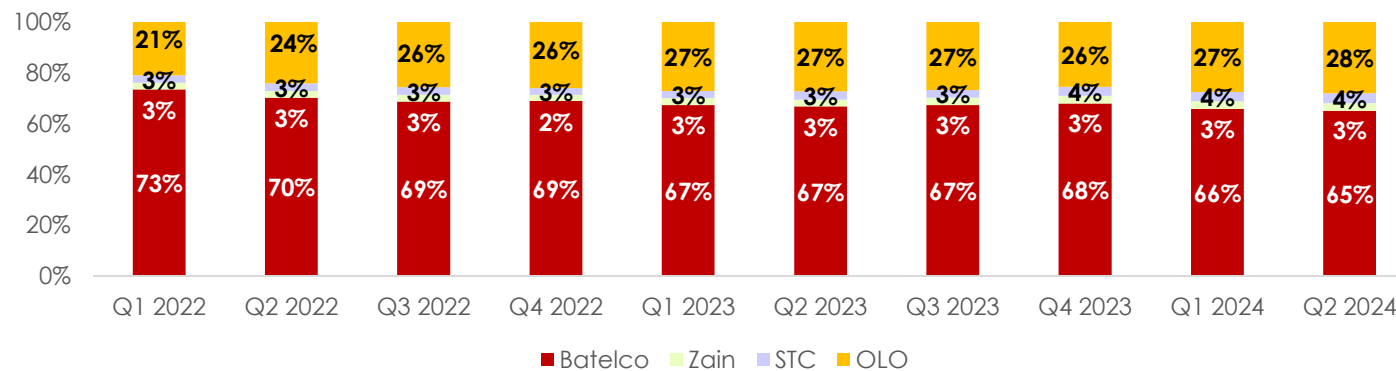
Q2 2023

37,369,697

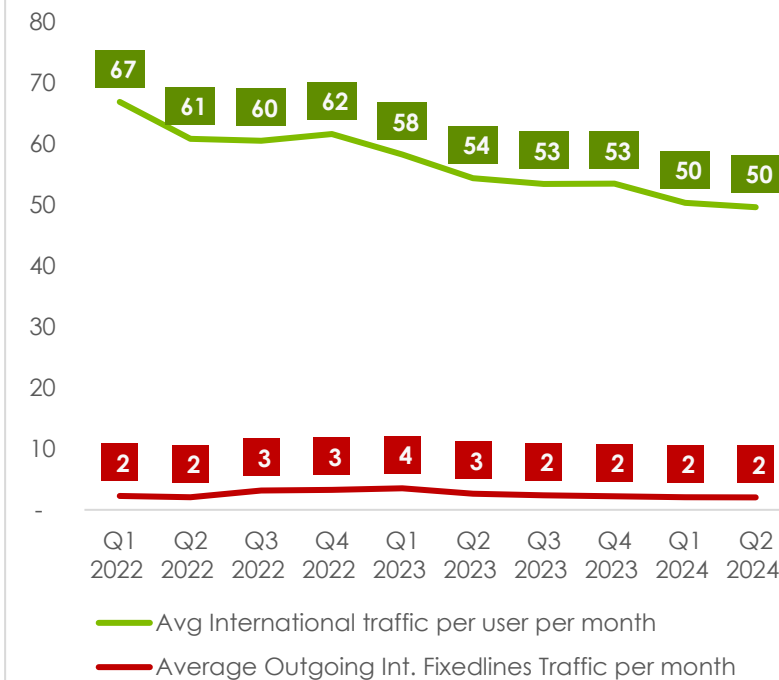
Q2 2024

32,800,677

Fixed line Domestic market share by operators



Monthly Average Outgoing Domestic & International Minutes Per Subscription



\* Includes VoIP and ISDN traffic.

# Broadband services: Subscriptions\* (1/2)



No. of broadband subscriptions (End of Q2 2024)

**2,611,135**

166% Penetration rate

Q2 2023

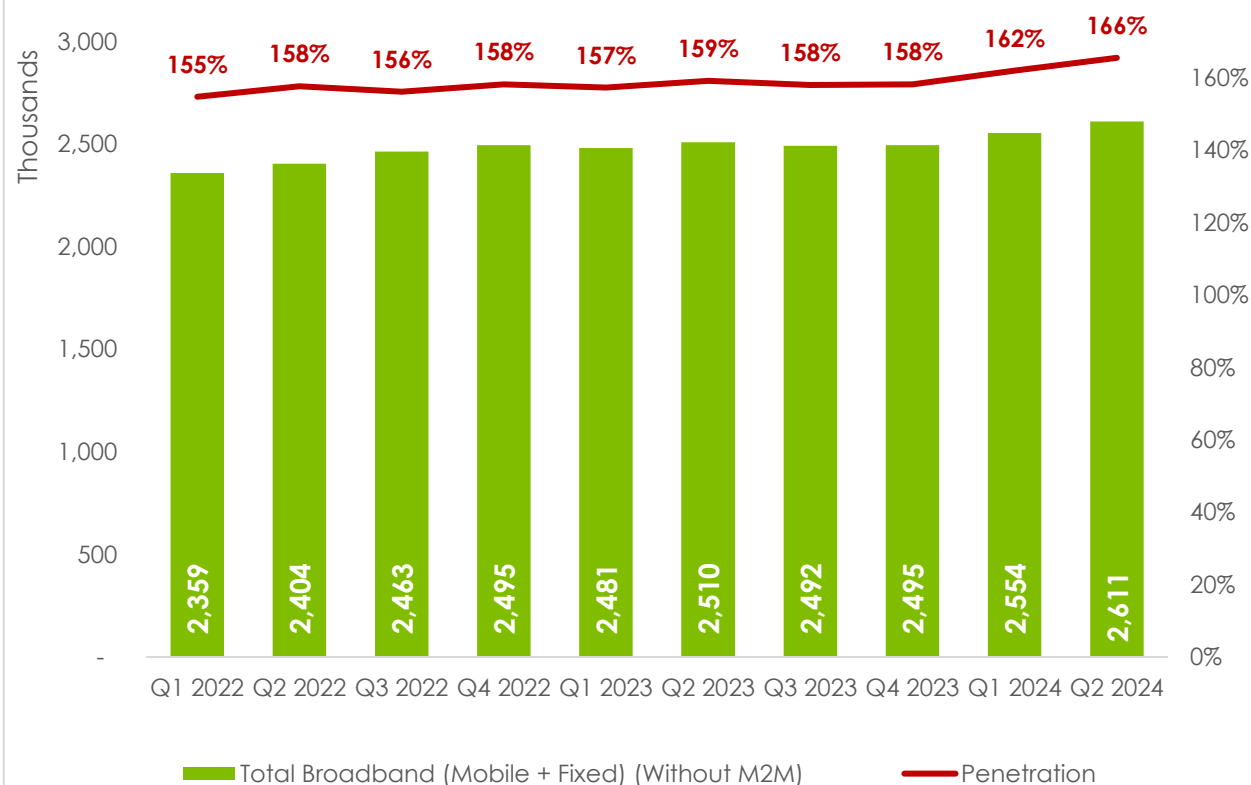
**2,510,354**

Q2 2024

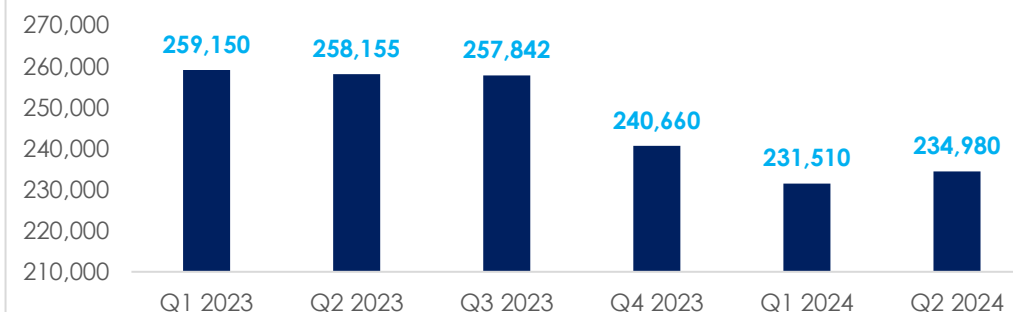
**2,611,135**

▲  
4%

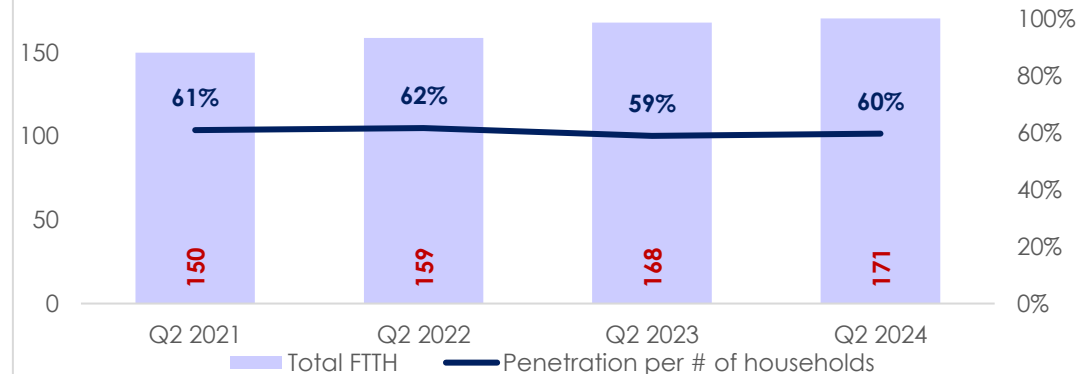
Broadband Subscriptions and Penetration\*\*



Home Broadband Subscriptions (Including Wired & Wireless)\*\*\*



Fiber subscriptions and household penetration\*\*\*



\* Doesn't include M2M.

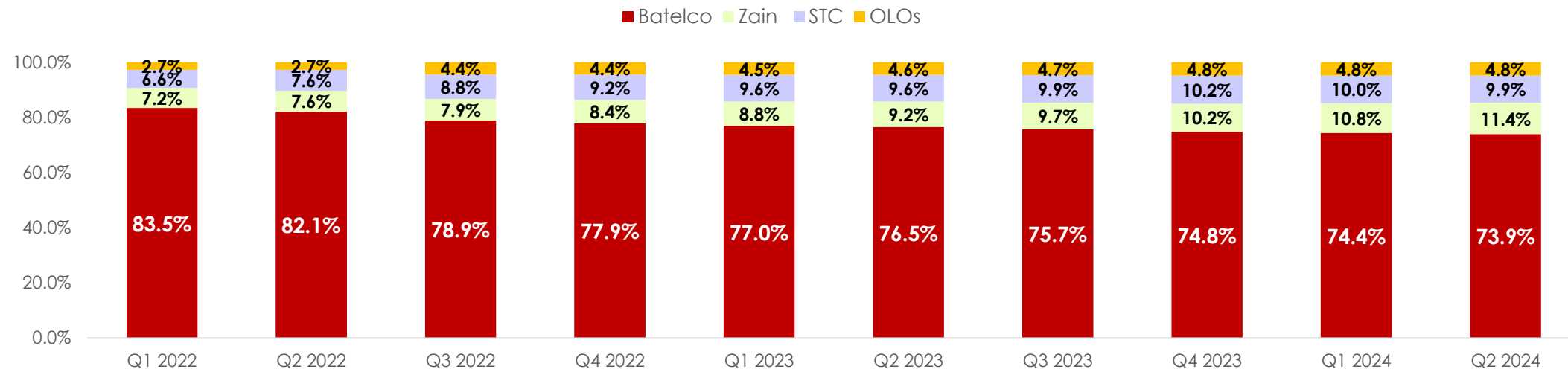
\*\* Mobile broadband data is currently under review.

\*\*\* Includes residential Fiber, Fixed Terrestrial and Mobile Home BB. Drop in Home Broadband subscriptions is due to activation of voice service.

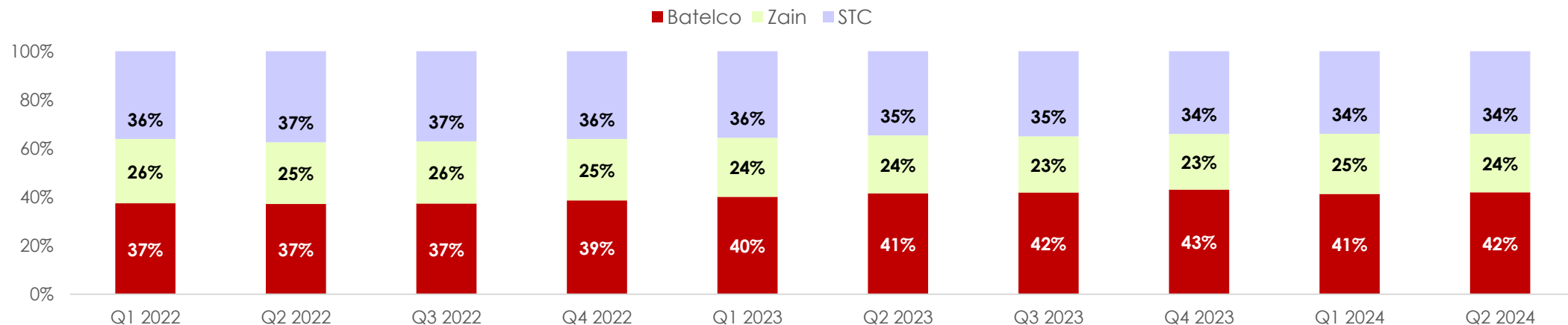
\*\*\*\* Number of households is based on the latest IGA data in 2024.

# Broadband services: Subscriptions (2/2)

## Fibre Broadband Subscriptions Market Share



## Mobile Broadband Subscriptions Market Shares



# Broadband services: Data Traffic 1 of 2



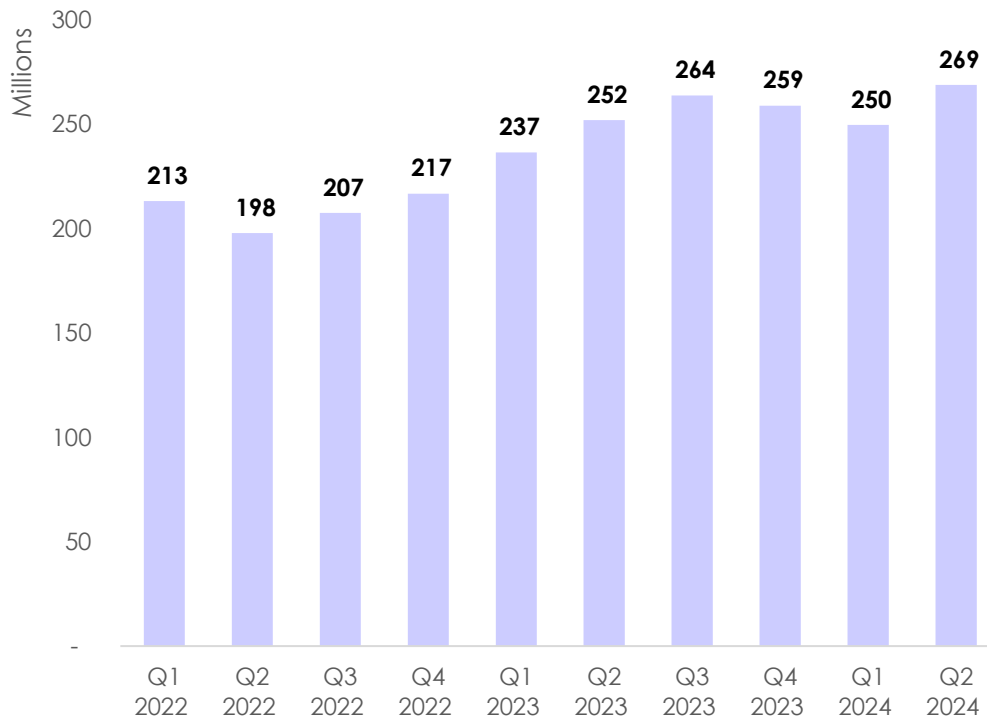
Total data traffic in Gigabyte

Q2 2023  
**442,590,758**

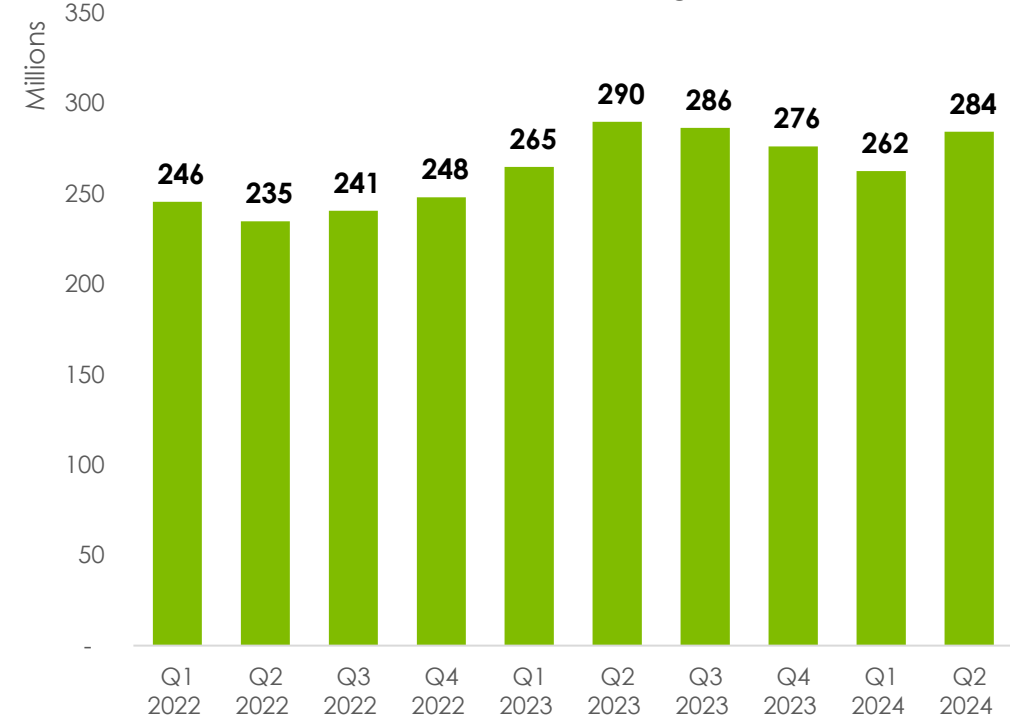
Q2 2024  
**502,381,012**

▲ 14%

### Fibre Broadband Traffic



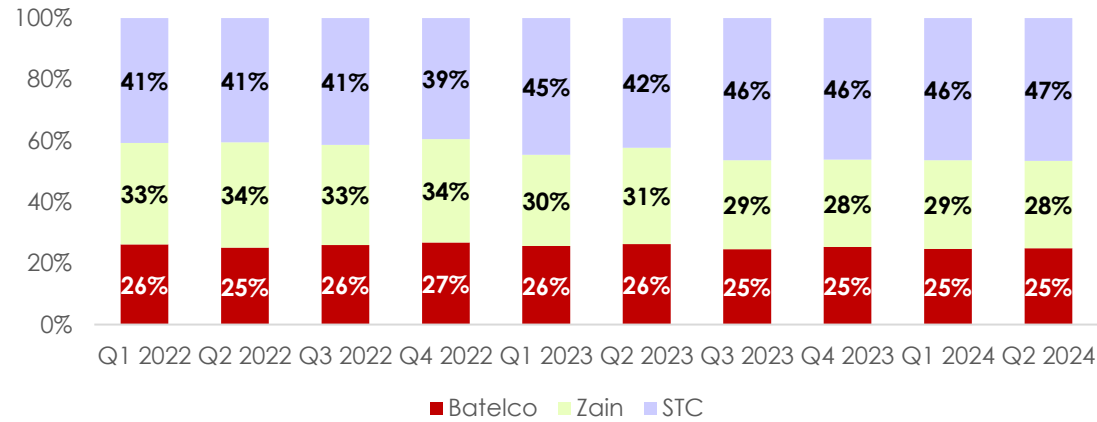
### Home Broadband Traffic\* (Including Wired & Wireless)



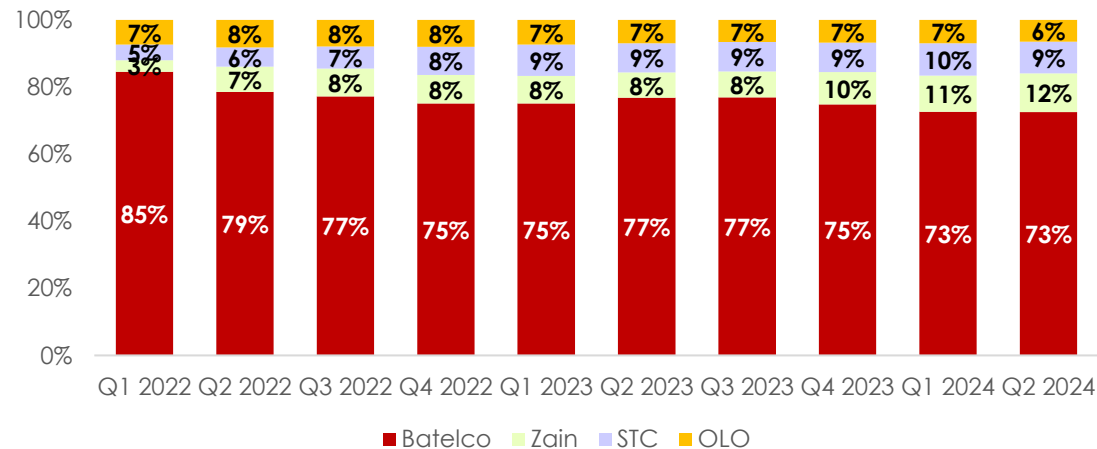
\* Includes residential Fiber, Fixed Terrestrial and Mobile Home BB.

# Broadband services: Data Traffic 2 of 2

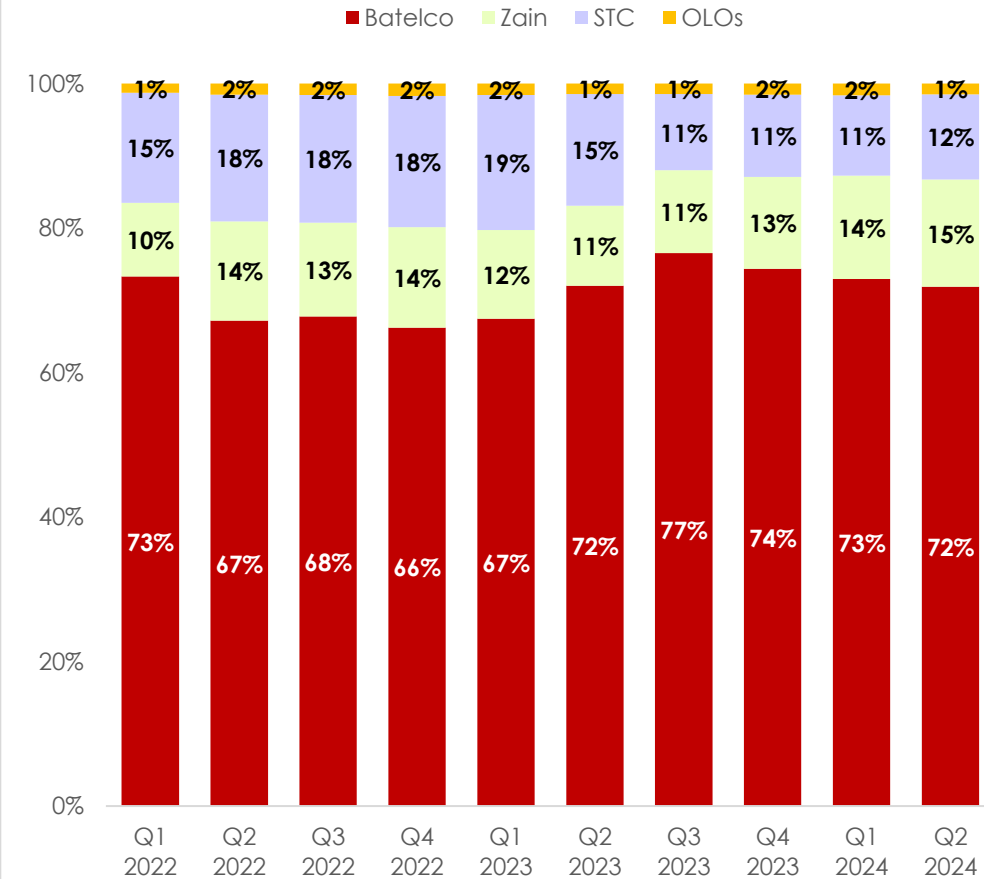
## Mobile Broadband Traffic Market Share



## Fixed Broadband Traffic Market Share\*



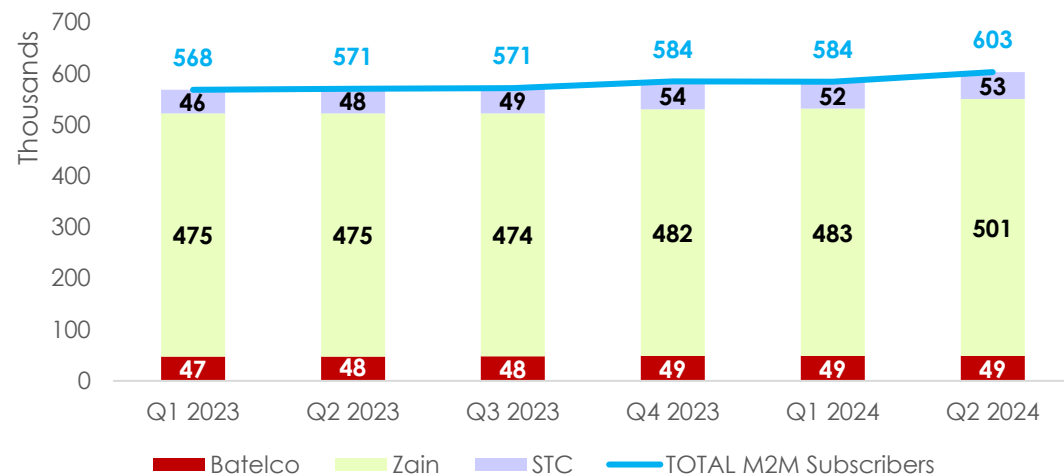
## Home Broadband Market Share (including Fixed wired, Fixed Wireless, Mobile Home BB)



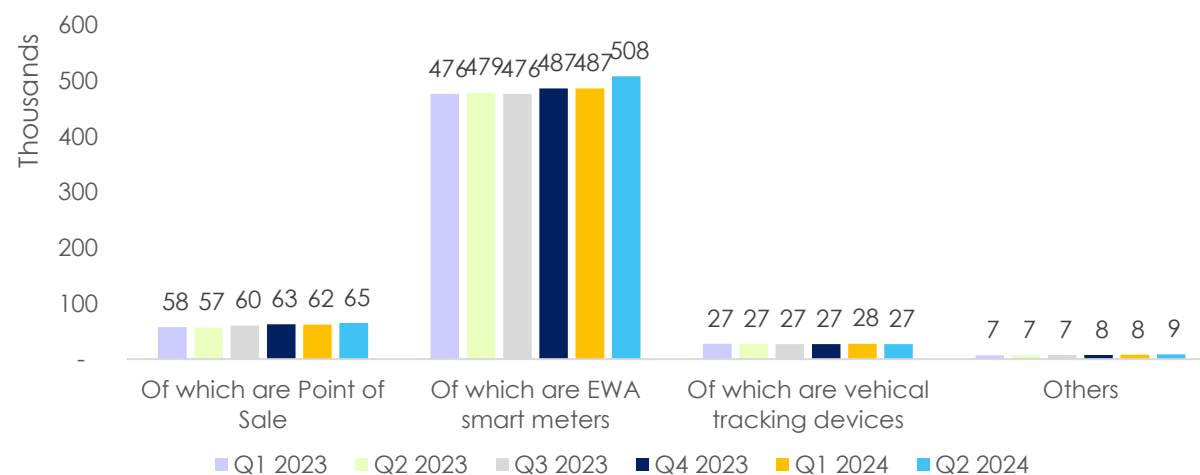
\*OLOs traffic for 2023 is currently under review and is therefore subject to change.

# M2M Subscribers & Traffic

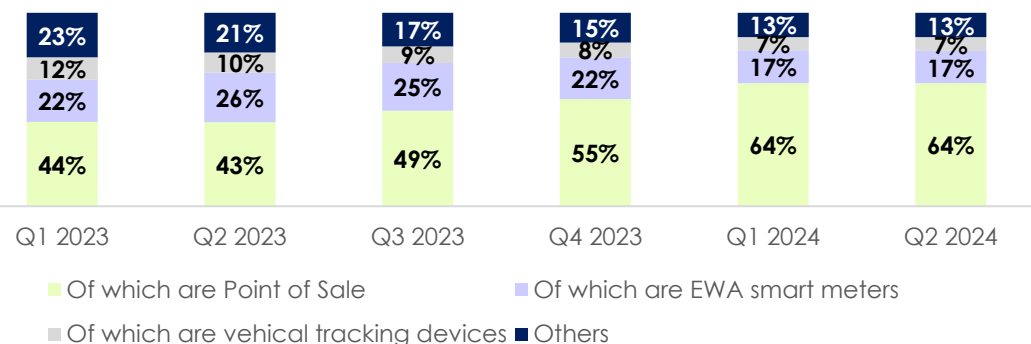
## M2M Subscribers (Thousands)



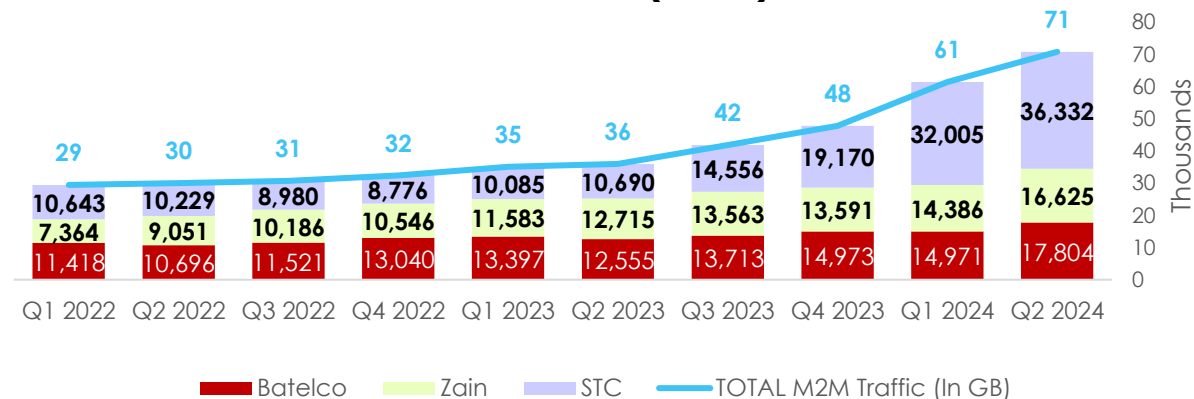
## M2M Subscribers by type



## M2M Traffic by Type (in GB)



## M2M Traffic (in GB)





# Definitions

## Fixed-telephone subscriptions

Fixed-telephone subscriptions refers to the sum of all active

- i) analogue fixed-telephone lines,
- ii) voice-over-IP (VoIP) subscriptions,
- iii) fixed wireless local loop (WLL) subscriptions,
- iv) ISDN voice-channel equivalents,
- v) fixed public payphones and vi) satellite-based subscriptions

provided to fixed locations that allow for a voice communication. This indicator was previously called Main telephone lines in operation.

\*Active lines are those that have registered an activity in the past three months.

## Prepaid mobile-cellular telephone subscriptions

Prepaid mobile-cellular telephone subscriptions (ITU code i271p) refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Only active subscriptions should be included (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet).

## Postpaid mobile-cellular telephone subscriptions

Postpaid mobile-cellular telephone subscriptions Refers to the total number of mobile-cellular subscriptions where subscribers are billed after their use of mobile services, at the end of each month. The postpaid service is provided on the basis of a prior arrangement with a mobile cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit.

## Active mobile-broadband subscriptions

Active mobile-broadband subscriptions refers to the sum of active handset-based and computer-based (USB/dongles) mobile-broadband subscriptions that allow access to the Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband-enabled handsets. Subscriptions must include a recurring subscription fee or if in the prepayment modality, pass a usage requirement – users must have accessed the Internet in the last three months.

Clarification: For mobile data subscription to be considered broadband, the operator must advertise a connection that will be capable of using at least a 3G/UMTS network, so that a nominal downloading speed of 256 kbit/s is at a minimum expected. Hence, subscriptions that are only to use GPRS and EDGE technologies are to be excluded. A contract (post pay) subscription pays a recurrent bill with a predetermined frequency. It should be counted as an active mobile broadband subscription no matter the effective data consumption realized by the user. A prepayment or a pay-as-you-go subscription needs to pass the activity criterion to be considered as 'active': a billable Internet connection must have occurred in the last three months. Note that for a mobile subscription to be considered broadband it must allow access to the public open Internet, hence, any subscription that limits access only to walled garden or services provided in exclusivity by the mobile operator, are not counted as access to the open Internet, and hence, are not 'broadband'. Several cases are defined below. (See Table 4 in ITU document)

# Thank You

# Annex A

# Mobile subscriptions – raw data

Prepaid <u>residential</u> subscribers						Prepaid non- <u>residential</u> subscribers*				
	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Batelco	595,732	609,640	630,755	610,892	648,126	N/A	N/A	N/A	N/A	N/A
Zain	427,940	430,924	463,812	497,767	494,880	382	N/A	N/A	N/A	N/A
STC	482,322	471,936	467,399	450,349	455,991	N/A	N/A	1	3	N/A
<b>Total</b>	<b>1,505,994</b>	<b>1,512,500</b>	<b>1,561,966</b>	<b>1,559,008</b>	<b>1,598,997</b>	<b>382</b>	<b>0</b>	<b>1</b>	<b>3</b>	<b>0</b>
Postpaid <u>residential</u> subscribers						Postpaid non- <u>residential</u> subscribers				
	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Batelco	251,457	262,205	267,218	292,698	299,533	39,328	39,561	40,252	40,597	41,146
Zain	113,295	126,083	139,471	149,593	163,369	27,386	27,784	28,240	29,900	25,573
STC	336,274	333,155	349,165	347,210	344,453	25,092	27,462	29,402	30,719	31,723
<b>Total</b>	<b>701,026</b>	<b>721,443</b>	<b>755,854</b>	<b>789,501</b>	<b>807,355</b>	<b>91,806</b>	<b>94,807</b>	<b>97,894</b>	<b>101,216</b>	<b>98,442</b>

\*An operator amended their reporting of prepaid non-residential subscribers starting Q3 2023.

# Fixed line subscriptions – raw data

## Fixed line subscriptions – PSTN & VoIP (residential)

	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Batelco	126,485	125,047	122,374	121,662	120,859
Zain	14,771	15,673	16,467	17,235	18,072
STC	7,768	7,850	7,298	7,105	7,000

## Fixed line subscriptions – PSTN & VoIP (non-residential)

Batelco	52,710	52,065	51,369	49,347	48,695
Zain	1,673	1,825	1,944	2,177	2,359
STC	2,840	2,909	3,036	3,116	3,121
OLOs*	9,378	9,716	9,716	9,716	9,716
<b>Total**</b>	<b>215,625</b>	<b>215,085</b>	<b>212,204</b>	<b>210,358</b>	<b>209,822</b>

\* Includes residential & non-residential

\*\* Excluding ISDN.

	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Basic-rate ISDN	854	833	788	726	707
Primary-rate ISDN	1,468	1,455	1,408	1,382	1,356
<b>Total</b>	<b>2,322</b>	<b>2,288</b>	<b>2,196</b>	<b>2,108</b>	<b>2,063</b>

# Fiber Broadband subscriptions – raw data

## Fiber Broadband subscriptions – (residential)

	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Batelco	127,787	126,908	126,394	125,958	125,740
Zain	14,115	14,901	15,711	16,502	17,362
STC	14,022	14,162	14,466*	13,976	13,649
OLOs	5,441	5,629	5,855	5,855	5,855
<b>Total</b>	<b>161,365</b>	<b>161,600</b>	<b>162,426</b>	<b>162,291</b>	<b>162,606</b>

## Fiber Broadband subscriptions – (non-residential)

	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Batelco	1,336	1,341	1,214	1,165	1,085
Zain	1,445	1,596	1,723	1,963	2,148
STC	1,888	2,297	2,487	2,790	3,007
OLOs	2,299	2,297	2,326	2,326	2,326
<b>Total</b>	<b>6,968</b>	<b>7,531</b>	<b>7,750</b>	<b>8,224</b>	<b>8,566</b>
<b>GRAND TOTAL</b>	<b>168,333</b>	<b>169,131</b>	<b>170,176</b>	<b>170,515</b>	<b>171,172</b>

\*STC figures amended for Q3-Q4 .

# Total Mobile Broadband subscriptions\* – raw data

## Mobile Broadband subscriptions – (Prepaid)

	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Batelco	595,732	609,640	630,755	610,892	648,126
Zain	368,482	349,554	344,437	368,943	361,249
STC	351,684	364,645	368,735	359,752	371,892

## Mobile Broadband subscriptions – (Postpaid)

Batelco	371,006	358,302	366,998	369,968	372,920
Zain	190,491	187,256	185,787	218,848	224,873
STC	434,394	437,174	420,459***	447,451	452,385
<b>Total**</b>	<b>2,332,985</b>	<b>2,314,646</b>	<b>2,317,171</b>	<b>2,375,854</b>	<b>2,431,445</b>

\* Excluding M2M

\*\* Increase in BTC prepaid Mobile BB is due to BTC revising definition to reflect subscriptions that had access to Internet in the last 90 days rather than 30 days previously (i.e. ITU definition).

\*\*\* STC Postpaid data amended from Q2 – Q4 2023.